



**DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
BUILDING 6A, WASHINGTON NAVY YARD
901 M STREET, S.E.
WASHINGTON, DC 20374-5040**

MCO 5040.8A
HDH-3
2 Jan 94

MARINE CORPS ORDER 5040.8A

From: Commandant of the Marine Corps
To: Distribution List

Subj: ANNUAL SUMMARY OF HQMC STAFF ACTIVITIES

Encl: (1) Instructions for the Preparation and Submission of
Annual Summary of Activities
(2) Sample Index Format
(3) Sample Format for Documented Summary of Activities

Report Required: Annual Summary of Activities (Report Control
Symbol MC-5040-01), par. 4 and enclosures (1),
(2), and (3)

1. Purpose. To establish the requirement for the Annual Summary
of Activities report of HQMC staff actions.

2. Cancellation. MCO 5040.8 (formerly HQO 5040.2C).

3. Information. The Annual Summary of Activities describes
succinctly, staff actions/events/systems/procedures initiated or
completed during the reporting period that contribute to the
overall accomplishment of the HQMC mission. When documented, it
includes basic research material that can be exploited by staff
agencies of HQMC and field organizations. It also provides the
reporting agency with a periodic summation of its experiences,
which can be used in future planning or in orientation of new
personnel.

4. Action

a. The Director of Marine Corps History and Museums will
coordinate the receipt of, compile, review, and accession the
Annual Summary of Activities. This report will be held in Marine
Corps Historical Center Archives and will be made available to
HQMC staff agencies for research upon request.

b. Heads of staff agencies will submit an Annual Summary of Activities per the instructions contained in enclosure (1), (2), and (3). Summaries submitted without documentation may be sent electronically via EMAIL. Report Control Symbol MC-5040-01 applies.



E. H. SIMMONS
Director of Marine Corps
History and Museums

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7000040 (5)
7000093/8145005 (2)
7000099, 144/8145001 (1)

2 Jan 94

INSTRUCTIONS FOR THE PREPARATION AND SUBMISSION OF
ANNUAL SUMMARY OF ACTIVITIES
MC-5040-01

1. System. Each HQMC staff agency will maintain, on an annual basis, a record of its activities.

2. Format

a. Submission of documented summaries will be in the format of enclosures (2) and (3).

b. Single copies of all pertinent documents relating to each activity will be attached. Marine Corps/Headquarters orders and bulletins, C/S projects, published books, periodicals, and pamphlets shall be referenced but need not be attached. JCS papers or classified documents shall be referenced but need not be attached. Individual staff agencies will, however, ensure that these documents are retired and marked for permanent retention per the reference. On submission of the documentation to the History and Museums Division, individual staff agencies will prepare memoranda to the Director of Administration and Resource Management Division (ARAE) listing the related classified/controlled documents and requesting that the custody cards for the document(s) be so marked for permanent retention and that the documents themselves be exempt from destruction. After the custody cards have been so annotated, the Director of Administration and Resource Management Division (AR) will endorse and forward these memoranda to the Director of Marine Corps History and Museums for retention with the documentation.

c. The title, remarks, and list of documents should not exceed one page of typing.

d. The head of each staff agency will sign each title page.

e. The title page will be prepared on plain bond paper utilizing standard pica-size type.

f. Each activity documentation sheet will be marked in the lower right-hand corner indicating its appropriate tab number. Each reference included as documentation of a title will also be identified in the lower right-hand corner (Example: Reference (a), Tab 1).

ENCLOSURE (1)

g. Each staff agency submission will be indexed as shown in the example in enclosure (2), with items of special significance appearing first.

h. The index, documentation sheets, and documentation will be placed in standard file folders and secured at the top by two 3/4-inch standard paper fasteners. An appropriate HQMC routing sheet will be secured to the outside of each folder. In cases where the submission is small, folders need not be used. The material may be submitted with a routing sheet and secured by a binder clip. The History and Museums Division will consolidate these submissions in one or more folders as necessary.

3. Reporting Date. Each staff agency will submit its documented Annual Summary of Activities to the Director of History and Museums (CMC (HD)) by 30 November (to cover the reporting period 1 October to 30 September).

ENCLOSURE (1)

SAMPLE INDEX FORMAT
MC-5040-01

MANPOWER DEPARTMENT

INDEX

OF

ANNUAL SUMMARY

OF ACTIVITIES

<u>TAB</u>	<u>TITLE</u>
1	INCREASED GRADE DISTRIBUTION FOR NCO'S
2	ACTIVE DUTY LIMITATION IN THE CASE OF SENIOR NCO'S
3	VARIABLE REENLISTMENT BONUS PROGRAM
4	MERITORIOUS COMBAT PROMOTIONS
5	TEMPORARY OFFICER PROGRAM
6	TEMPORARY LDO PROGRAM
7	FY76 END STRENGTH INCREASE
8	DEVELOPMENT OF MANPOWER REQUIREMENTS VOUCHER TO ASSIST IN OVERALL MANAGEMENT
9	MANPOWER CONTROL AND UTILIZTION MANUAL
10	MANPOWER CONTROL SYSTEM

ENCLOSURE (2)

2 Jan 94

SAMPLE FORMAT FOR DOCUMENTED SUMMARY OF ACTIVITIES

MC-5040-01

CLASSIFICATION

(STAFF AGENCY)

TITLE

- A. REMARKS: (Include sufficient information for a succinct, overall review of the activity.)
- B. DOCUMENTATION: (a) Standard identification information to include subject
(b) Standard identification information to include subject
(c) Standard identification information to include subject
1. There is no limit to the number of documents listed and included, but the remarks and documentation should not exceed one page.
2. References should be attached, as appropriate, in the sequence listed and identified in the lower right-hand corner of the reference (Example: Reference (a), Tab 1).
3. A copy of all the references listed must be included unless they are exempted by subparagraph 2b of enclosure (1) to this Order. Downgrading/declassification instructions will be indicated in the lower left-hand corner of each classified document.

(Signature of the head of the staff agency)

DOWNGRADING/DECLASSIFICATION
INSTRUCTIONS

CLASSIFICATION

TAB

ENCLOSURE (3)